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CONNECTICUT WEALTH MANAGEMENT PROMOTES MEGAN TRASK TO MANAGING ADVISOR AND DIRECTOR OF THE INVESTMENT COMMITTEE

FARMINGTON, Connecticut—March 9, 2020—Connecticut Wealth Management, LLC (CTWM), a registered investment advisor committed to creating genuine partnerships with clients in order to provide unbiased financial planning and asset management, today announced the promotion of Megan Trask, CFP®, to Managing Advisor and Director of the Investment Committee.

Since joining CTWM in 2017, Megan has assisted clients in determining financial goals and developing plans to help reach them. She is also responsible for the development and implementation of the organization's target investment portfolios and oversees CTWM's retirement plans and participant education programs.

"Megan is extremely dedicated to our clients and professional team," said CEO Kevin C. Leahy. "It's a pleasure to work alongside her and we look forward to her continued growth here at Connecticut Wealth Management."

Megan's work has also been recognized outside the organization. She was recently designated as a "Five Star Wealth Manager" by Crescendo Business Services in both 2018 and 2019, an elite list of exceptional industry professionals that appears annually in Connecticut Magazine.

"I feel incredibility grateful that I wake up every morning and look forward to my day at work," said Megan Trask. "Helping our clients identify and reach their goals, facilitating lively and thoughtful deliberations within our investment committee, and collaborating with my genuine and intelligent colleagues creates a fabulous work place environment and gives me such personal fulfillment."

Prior to joining CTWM, Megan was a Senior Wealth Planner at Reynders, McVeigh Capital Management, LLC in Boston. She was responsible for communicating the firm's proprietary research on public equities, private placement investments, as well as socially responsible strategies to individual clients. She also worked in the Investor Services Department of Brown Brothers Harriman with institutional clients.

As a part of her community, Megan is a member of the Investment Committee for the Village for Families & Children where she helps to develop investment policy and due diligence for the organization's endowment. She is the advisor to the Vice President of Academic Excellence of the Kappa Kappa Gamma sorority at the University of Massachusetts, Amherst. She assisted in developing the 100-person chapter's scholastics expectations and requirements and visits quarterly to ensure adherence. Megan is also a mentor and delivery angel for Healing Meals. In addition, she is actively involved in CTWM's community outreach efforts.

About Connecticut Wealth Management, LLC

Connecticut Wealth Management LLC is a registered investment advisor that believes in creating genuine partnerships, building trust and understanding with clients in order to provide unbiased financial planning and asset management to individuals across Connecticut and nationwide. Connecticut Wealth Management takes pride in employing an independent business model that aligns our interests with those of our clients, and engaging in a collaborative, team approach to create empowering wealth management strategies and solutions. For more information about Connecticut Wealth Management LLC., visit www.CTWealthMgmt.com.